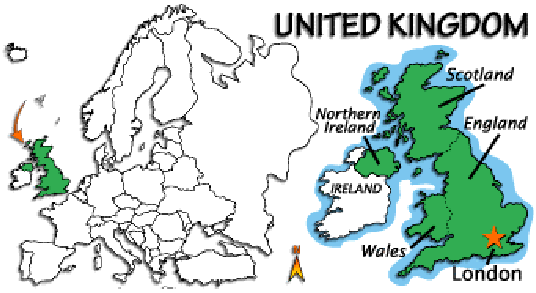
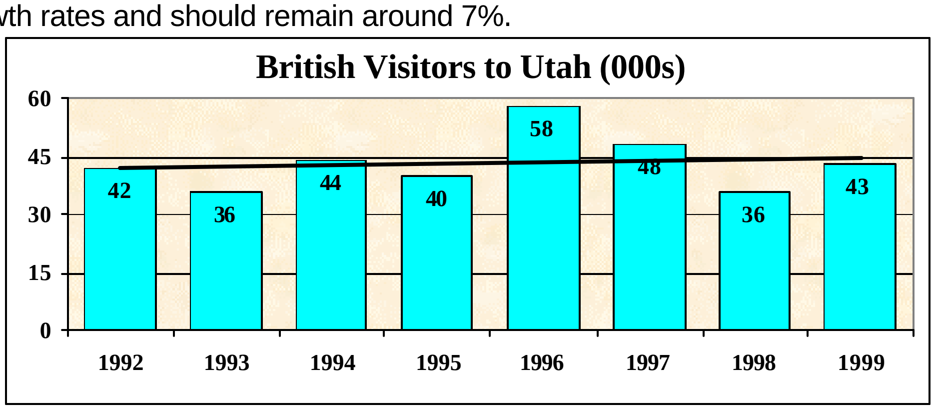


UNITED KINGDOM
Market Profile Summary

Total outbound travel from the United Kingdom increased strongly in 1999 at 7.1%. Long-haul travel grew slightly less at 6.2%. Arrival numbers from the U.K. to the U.S. have grown steadily for most of the past decade, with average growth rates of around 7%. The only year since 1990 in which visitation to the U.S. has declined was in 1994. However, arrivals rebounded in 1995 and have continued to grow steadily since then. Since 1995, total U.S. arrivals from the U.K. have grown 47%, capturing an increasing share of the long-haul travel market in each year.

The U.K. remains one of Utah's top international markets. Since 1992, visitation to Utah from the U.K. has been somewhat volatile, although the number of visitors usually fluctuates between 40,000 and 50,000. Utah has not participated in the steady increase in British visitors to the U.S. Consequently, Utah has experienced slight erosion in market share among British travelers. The biggest advantage for the traveler from the U.K. is the familiarity with the language and confidence in being able to travel independently. *Most travelers to Utah from the U.K. are repeat visitors who have previous U.S. travel experience. Consequently, many Brits look to Utah as a new and unique destination.* The presence of direct flights to Las Vegas from the U.K. bodes well for future travel to Utah as more British travelers look to convenient destinations outside Las Vegas. In addition, the U.K. represents Utah's largest international ski market. On average, visitors from the U.K. stay four additional nights in Utah than other overseas visitors to the state. The average daily expenditure per visitor from the U.K. is $55.

The British economy grew slowly in 1999, with real GDP rising at only 2.0%. The strength of the pound relative to the Euro and other European currencies was at a fifteen year high, likely contributing to low net exports. Nevertheless, private consumption fueled the British economy in much the same way as it did the U.S. economy. The next few years should see continued growth in the U.K.'s economy as exports recover and consumption remains steady. Overall, economic conditions in the U.K. are conducive to growth in the long-haul travel market. More Britons are employed than in recent years and wages are higher. At the same time, the savings rate is relatively high. These indicators suggest that pleasure travel is within the reach of the average economically active resident. Growth forecasts for British arrivals to the U.S. mirror historic growth rates and should remain around 7%.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM THE U.K. SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)	
Averare Age (mean)	45.0
18-34 Years	31%
35-54 Years	37%
55+ Years	32%

HOUSEHOLD INCOME ($US)	
Average HH Income	$72,500
< $40,000	23%
$40,000 - $80,000	48%
$80,000 - $120,000	16%
$120,000+	13%

PARTY COMPOSITION	
Avg. Travel Party (mean)	1.8
Spouse	48%
Traveling Alone	24%
Family/Relatives	19%
Friends	10%
Business Associates	8%
Adults Only	97%
Adults and Children	3%

GENDER	
Men	63%
Women	37%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	85%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.5
1 Trip	20%
2 - 5 Trips	60%
5+ Trips	20%

OTHER DESTINATIONS VISITED	
# of States Visited	3.4
# of Destinations Visited	5.1
California	46%
Los Angeles	24%
San Francisco	24%
Yosemite N.P.	9%
Nevada	42%
Las Vegas	38%
Arizona	47%
Grand Canyon N.P.	30%
Phoenix	15%
Wyoming	15%
Yellowstone	11%
New York	10%
New York City	9%
Colorado	18%
Denver	15%
Illinois	13%
Chicago	12%

TRAVEL PATTERNS

ADVANCE TRIP DECISION	
Advance Trip Decision	127 Days
Advance Air Reservations	91Days
Use of Pre-Booked Lodging	61%

USE OF PACKAGES	
YES	30%
Air/Lodging	20%
Air/Rental Car	16%
Guided Tour	15%
Air/Lodging/Rental Car	11%
Air/Lodging/Tour	7%
Air/Lodging/Bus	4%
Air/Lodging/Bus/Tour	3%
Advance Package Booking	127 Days
# of Nights Pre-paid as Part of a Package	11.5

INFORMATION SOURCES	
Travel Agency	70%
Friends/Relatives	18%
Travel Guides	17%
Airlines Directly	14%
Tour Company	13%
Personal Computer	12%
Newspapers/Magazines	11%
State/City Travel Office	5%
Other	5%

ACCOMMODATIONS	
Hotel/Motel	78%
Private Home	11%
Other	15%

TRANSPORTATION IN U.S.	
Rented Auto	52%
Airlines in U.S.	38%
Taxi/Cab/Limousine	30%
Company or Private Auto	30%
Bus Between Cities	12%
City Subway/Tram/Bus	11%
Other	5%

LENGTH OF STAY	
# of Nights In UT (mean)	9.7
# of Nights in US (mean)	23.4

UTAH DESTINATIONS VISITED	
Salt Lake City	36%
Bryce Canyon N.P.	23%
Zion N.P.	21%
Monument Valley	11%
Glen Canyon	5%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP	
Leisure & VFR	82%
Leisure/Rec./Holidays	66%
Visit Friends/Relatives	16%
Business & Convention	18%
Business/Professional	13%
Convention/Conference	5%

PORT OF ENTRY	
Los Angeles	19%
San Francisco	14%
Chicago	13%
Newark	7%

LEISURE ACTIVITIES	
Dining in Restaurants	96%
Shopping	84%
Touring Countryside	75%
Visit National Parks	74%
Sightseeing in Cities	57%
Visit Historic Places	55%
Visit Small Towns	52%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	32%
Casinos/Gambling	29%
Amusement/Theme Parks	29%
Water Sports/Sunbathing	23%
Guided Tours	23%
Ethnic Heritage Sites	22%
Art Gallery/Museum	20%
Camping/Hiking	17%
Concert/Play/Musical	15%
Nightclubs/Dancing	14%
Attend Sports Event	13%
Snow Skiing	11%
Environ./Eco Excursions	8%
Ranch Vacations	5%
Golfing/Tennis	4%
Cruises	3%
Hunting/Fishing	3%

PERFORMANCE	
Total Int'l. Visitation (000s)	43
Market Share	1.0%
Avg. Spending Per-Visitor-Per-Day (mean)	$55

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries